

Five Year Interval Review Technical Assistance

Arizona State Board for Charter Schools

March 13, 2013

Today's Agenda

- Performance Management Plans
- Financial Performance Response
- Charter Holder Organizational Membership
- School Characteristics

Academic Performance Expectations

- Academic Performance Framework
 - Adopted by the Board in November 2012
 - Used to communicate academic expectations
 - Serves as a basis for analysis to be used in high-stakes decisions
- Charter Holder's academic performance evaluated using state assessment results for the previous two years

Academic Performance Rating FY 2012

Charter Holder: Sample for Demonstration, Inc.

Entity ID 00001

Charter School: Sample for Demonstration

Entity ID 00000, Grades 5-8

1. Growth

Traditional Elementary		1a. SGP		1b. SGP Bottom 25%	
School	School Year	Math	Read	Math	Read
Sample for Demonstration	2011-2012	39.5	49.5	40.5	54
Points Assigned		50	50	50	75
Weight		12.5	12.5	12.5	12.5

2. Proficiency

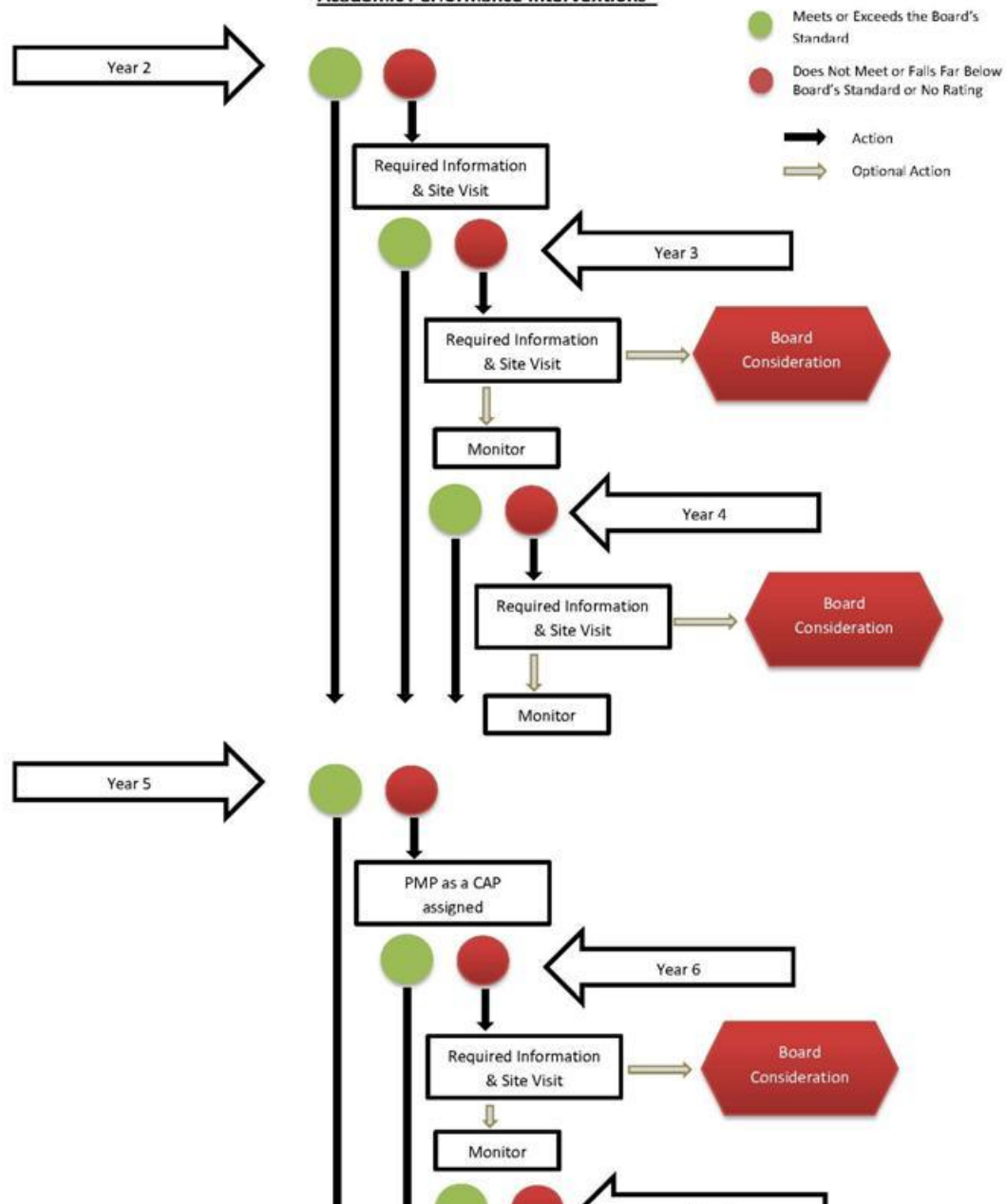
Traditional Elementary		2a. Percent Passing		2b. Composite School Comparison		2c. Subgroup ELL		2c. Subgroup FRL		2c. Subgroup SPED	
School	School Year	Math	Read	Math	Read	Math	Read	Math	Read	Math	Read
Sample for Demonstration	2011-2012	58	84	-3.9	4.1	NR	NR	51	81	11	53
Points Assigned		50	75	50	75			75	75	50	75
Weight		7.5	7.5	7.5	7.5	0	0	3.75	3.75	3.75	3.75

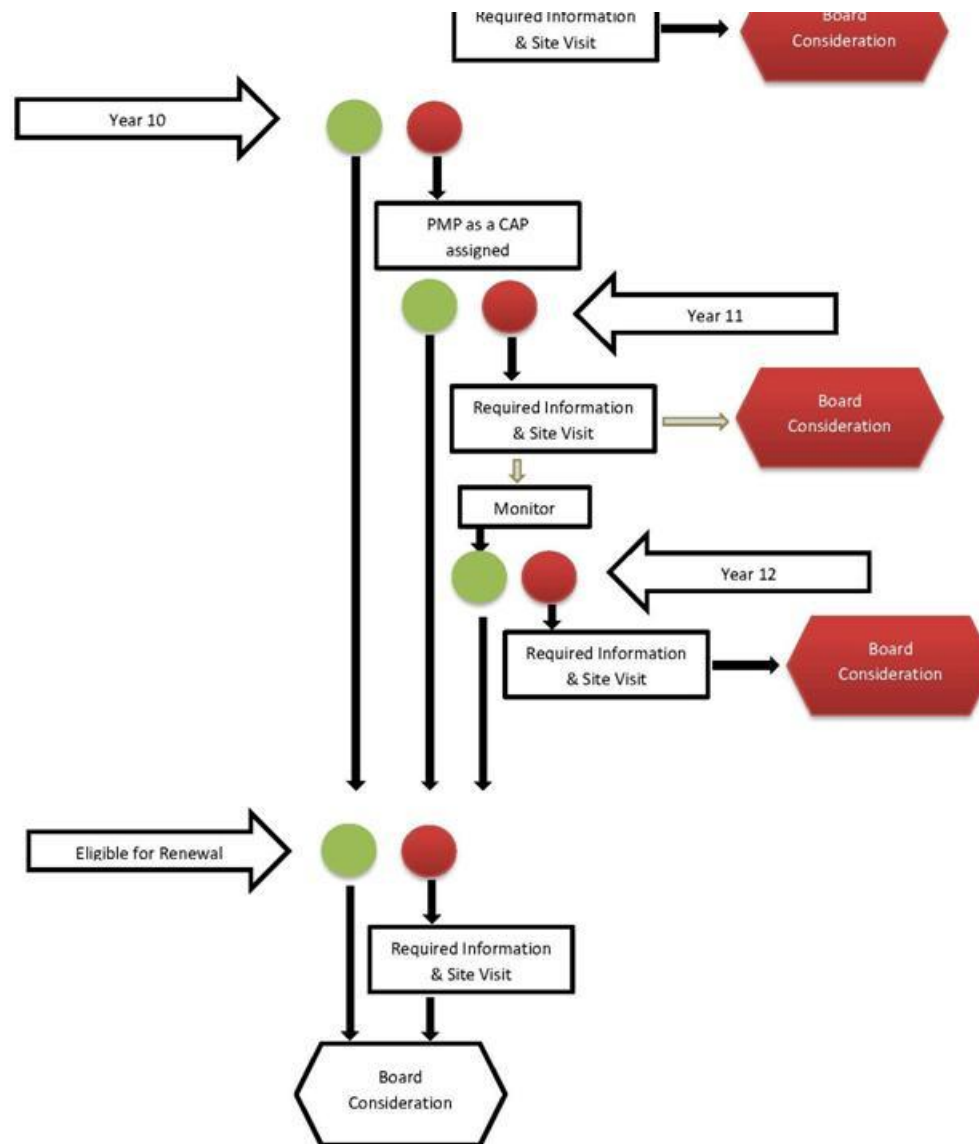
3. State Accountability & Overall Rating

Traditional Elementary		3a. State Accountability	Overall Rating
School	School Year	Grade	
Sample for Demonstration	2011-2012	50	59.6875
Points Assigned		50	
Weight		5	100

Overall Rating	Point Range
Exceeds Standard	> or = to 89
Meets Standard	< 89, but > or = to 63
Does Not Meet Standard	< 63, but > or = to 39
Falls Far Below Standard	< 39

Academic Performance Interventions*





*For purposes of periodic and five-year interval reviews, the framework will be applied as displayed. This display in no way precludes the Board from making determinations of academic performance at other times or from assigning interventions, including when the Board makes decisions related to a charter holder's financial and/or operational performance.

I. Performance Management Plan

- PMP Narrative
 - Description of previous improvement efforts
 - Data analysis (may include the dashboard)
 - Findings
 - Description of how the plan addresses the findings

II. Performance Management Plan

- PMP Template
 - Indicators
 - Measures
 - Strategies
 - Action Steps

PMP Template

- Indicators
 - Growth
 - Proficiency
 - State Accountability
 - Post-Secondary Readiness

Indicators and Measures

- Growth
 - SGP
 - SGP of Bottom 25%
 - Improvement
- Proficiency
 - Percent Passing
 - Composite School – expected vs. actual
 - Subgroup Percent Passing

Indicators and Measures

- State Accountability
 - Letter Grade
- Post-Secondary Readiness
 - Grad Rate
 - Persistence

Strategies

- Provide and implement a curriculum that improves student achievement.
- Develop and implement a plan for monitoring the integration of the Arizona Academic Standards into instruction.
- Develop and implement a plan for monitoring and documenting student proficiency.
- Develop and implement a professional development plan that supports effective implementation of the curriculum.

Action Steps

- Based on the findings from the analysis of relevant data
- Sequential, timely, and contribute to the success of the plan
- Compliment and support the other strategies
- Provide evidence of implementation
- Allow for adequate resources

Shift...

From focus on:

- Content
 - Math
 - Reading
- Strategies

To focus on:

- Indicators
 - Growth
 - Proficiency
 - State Accountability
 - Post-Secondary Readiness
- Strategic

PERFORMANCE MANAGEMENT PLAN TEMPLATE

Directions: For each strategy, check all Indicators and list all Measures from the dashboard being addressed in the strategy's action steps.

INDICATOR: ___Growth ___Proficiency ___State Accountability ___Post-Secondary Readiness

MEASURE	End Target For This Plan
Identify the measures being addressed with this plan.	
	Meet the academic performance expectations set forth in the Board's Academic Performance Framework.

STRATEGY I: Provide and implement a curriculum that improves student achievement.

Action Steps*	Timeline	Responsible Party	Evidence of Meeting Action Steps	Budget
1.				
2.				
3.				
4.				

* Add action steps as necessary to include the appropriate number of steps to accomplish the strategy

Evaluation Criteria

- Based upon both parts of the plan
 - Narrative
 - Template
- Three levels
 - Fully described
 - Partially described
 - Very limited description
- Valuable tool for preparing the plan

Annual Reporting Requirement

- Based on Overall Rating on Academic Performance Framework
 - Waived if two consecutive years of “Meets” or “Exceeds”
 - Required if “Does Not Meet” or “Falls Far Below” in at least one year of the two most recent years
- Required submission of a Demonstration of Sufficient Progress (DSP)

Demonstration of Sufficient Progress

- Appendix D in the Academic Performance Framework and Guidance document
 - Instructions for preparing DSP
 - Includes **Evaluation Criteria**
 - DSP is organized around the strategies from the PMP (curriculum, instruction, assessment, professional development)

Plan Development Resources

- Five Year Interval Review Instructions
- Academic Performance Framework and Guidance document
- Arizona Charter Schools Association
- http://asbcs.az.gov/school_resources/default.asp

Financial Performance Expectations

- Financial Performance Framework
 - Adopted by Board in August 2012
 - Used to gauge near-term financial health and longer term financial sustainability
 - Excludes measures that address how a charter holder manages and expends its funds
- Charter Holder's Financial Performance Evaluated Using Most Recent Audit

Near-Term Indicator Measures

- Going Concern
 - Determination made by independent CPA based on charter holder's ability to continue operating for next fiscal year
- Default
 - Determination made by lender
- Unrestricted Days Cash
 - Indicates how many days a charter holder can pay its expenses without another influx of cash

Sustainability Indicator Measures

- Total Liabilities to Equity Ratio
 - Shows level to which the charter holder is relying on outside funding, such as loans
- Net Income
 - Identifies whether or not charter holder is operating within available resources

Sustainability Indicator Measures

- Cash Flow
 - Shows change in charter holder's cash balance from one fiscal year to another
- Fixed Charge Coverage Ratio
 - Looks at amount of cushion in charter holder's cash flow to cover fixed obligations or charges
 - Fixed charges represent charter holder's fixed financial commitments

Financial Performance Response

- Required If Charter Holder Received:
 - Two or more “Does Not Meet Standard”; and/or
 - One or more “Falls Far Below Standard”
- Preparing Required Response
 - Evaluate your financial situation and efforts
 - Provide response for each measure that received a “Does Not Meet” or “Falls Far Below”
 - See “[Guidance](#)” document for examples
 - Due by April 19th (See [Instructions](#) for information on how to submit)

“Budget” – PMP Template

- Involve Those that Oversee School Budget and Finances in PMP Development Process
- Communicate PMP Budget Needs to Ensure They Are Included in School’s Overall Budget

Organizational Membership

- If the Corporate Board on file with Arizona State Board for Charter Schools does not **match** the current documents on file with the Arizona Corporation Commission, Charter Holders will be required to complete the Organizational Membership Section

Sample School, LLC	
ASBCS	ACC
Martha Morgan	Martha Morgan
Steve Sarmento	Steve Sarmento
Lisa Weisberg	Lisa Weisberg
	Andrea Leder

How to Update

- Make the change with ASBCS using the Charter Holder Governance Notification Request

Sample School, LLC	
ASBCS	ACC
Martha Morgan	Martha Morgan
Steve Sarmento	Steve Sarmento
Lisa Weisberg	Lisa Weisberg
	Andrea Leder

- Make the appropriate filing with the ACC and submit a copy to ASBCS so we are aware the change is in process

Sample School, LLC	
ASBCS	ACC
Martha Morgan	Martha Morgan
Steve Sarmento	Steve Sarmento
Lisa Weisberg	Lisa Weisberg
Andrea Leder	

- Make changes in both places

Sample School, LLC	
ASBCS	ACC
Martha Morgan	Martha Morgan
Steve Sarmento	Steve Sarmento
Lisa Weisberg	Lisa Weisberg
Andrea Leder	DeAnna Rowe

Organizational Membership Response

- Clearly label and identify
- Status Update
 - Notify us how you are reconciling
 - Include when it will be completed
 - Status update due by April 19th

School Characteristics

- Identified on ASBCS Online
- Public search

Schools :: Search

FindSchool within miles of

Leave this blank to look for any school.

Enter any location here such as a ZIP code, cross street, or physical address.

Services**Grades**

toggle all checkboxes

- ☐ K ☐ 1st ☐ 2nd
☐ 3rd ☐ 4th ☐ 5th
☐ 6th ☐ 7th ☐ 8th
☐ 9th ☐ 10th ☐ 11th
☐ 12th

Characteristics

toggle all checkboxes

- ☐ Alternative/ At Risk ☐
☐ Back to Basics ☐ Blended Learning ☐ Cambridge/ ACT Quality Core
☐ College Preparatory ☐ Computer-based ☐ Core Knowledge
☐ Dual Language ☐ Equine/ Argricultural Studies ☐ Expeditionary Learning
☐ Extended Day/ Year
☐ Fine Arts focus ☐ International Baccalaurate ☐ Math and Science/ STEM
☐ Montessori ☐ Multi-age ☐ Multiple Intelligences
☐ Online/ Virtual ☐ Project-based ☐ Special Populations

Filter

Phone
ZIP Code
City
County
Authorizer

Advanced

Entity ID
CTDS
Legislative District

School Characteristics

- No more than 3
- Verified
 - Charter contract
 - Program of instruction

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